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2025 ASK A SAGE EXPERT SERIES

*Scaling SIP Mountain:*

# Your Guide to Reaching Peak Planning

# Zoom Tips

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### Ask Questions

Please feel free to unmute yourself and ask questions live, or use the "As a Question" feature to type them in.

### Chat

Click the Chat button at the bottom of the Zoom window to open the chat panel, where you can send messages and engage with participants either publicly or privately.

### Raise Your Hand

if you need assistance, click the Raise Hand button in the Zoom toolbar to alert the host, and they will address your concern as soon as possible.

# Today's Presenters

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**Kern Eaker**

*Solution Architect*

**Forrest Schumaker**

*Senior Consultant*

# Quest Objectives

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**01**

Understand the core features and functionality of Sage Intacct Planning

**02**

Learn how to utilize SIP to improve your budgeting and forecasting processes

**03**

Explore best practices for continuous planning improvements and success

# Sage Intacct Planning

- **Dashboards**

- **Inputs**

- **Models**

# Dashboards

- Create multiple graphic representations of your budget

- Easily switch between the different dashboards and filter the data as needed

- Personalize different dashboards for the various departments and groups in your company

- Create and add relevant widgets to each dashboard

# Inputs

- See your Profit & Loss, Balance Sheet and Statistical accounts from the Inputs
  - **Main:** See all the GL accounts that are linked to each budget line in your budget tree
  - **Model:** View models/calculations for Department trips, Cost of Revenue, or Revenue
    - ➢ Begin with a model from the library or create a custom model for your needs
  - **Tables:** See your budget tree structure in a table and filter the table by accounts

# Models

- Create calculations with various fixed assumptions

- Models can easily be added to budgets

  o Changes to Models directly impact the budget lines to which they are assigned

- Fixed Assumptions can be used throughout the system for calculations

# Reporting

- **Compare budget(s) using Sheets tab:**

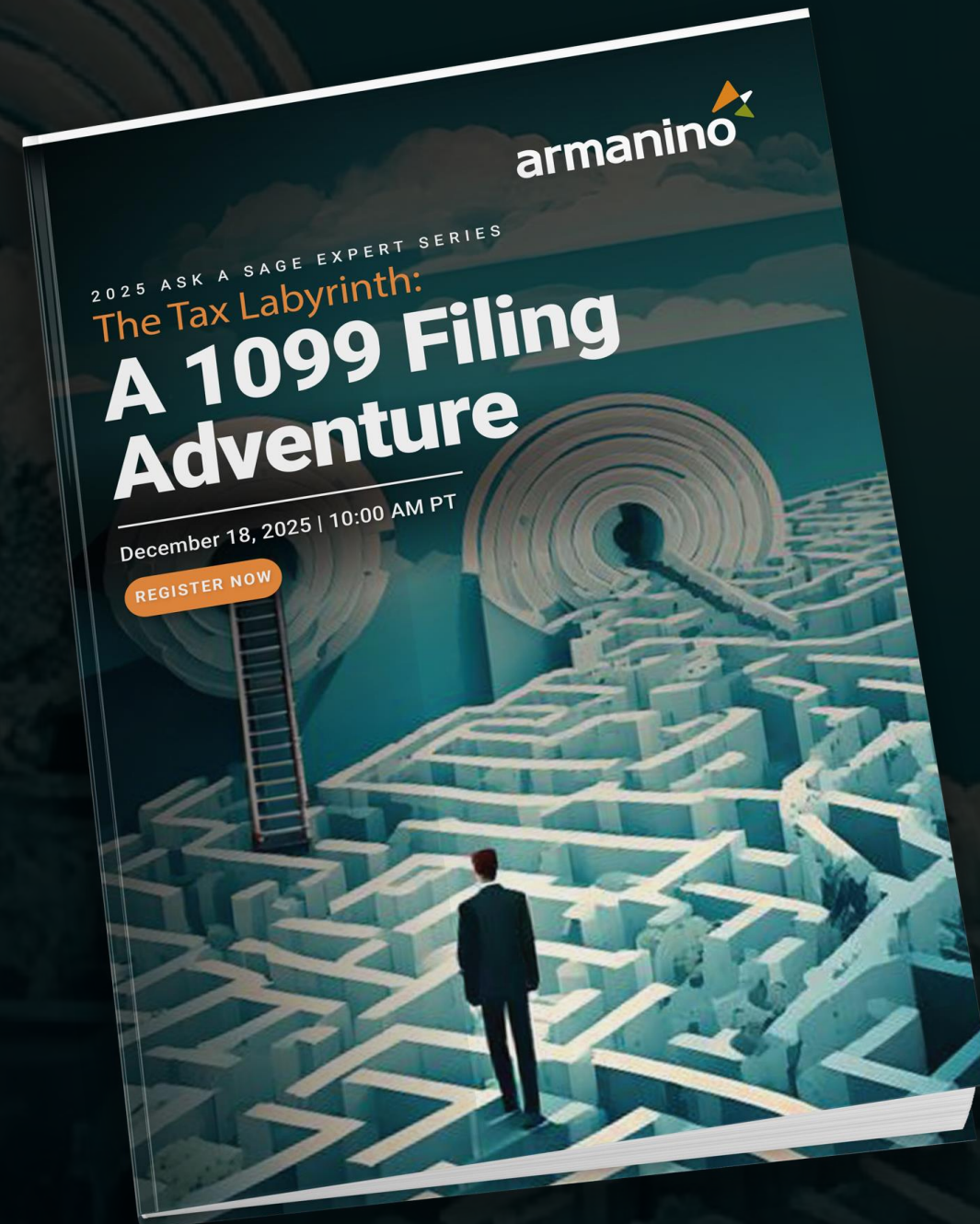  - **Actuals**

  - **Forecasts**

  - **Scenarios**

# Sage Intacct Planning Help Center

# Continuing Learning to Grow Your Skillset

- Video Hub – Watch short videos to help keep you moving towards finalizing your budget

- Detailed guides for each part of the process

- Sage Intacct Planning offers webinars each month, free to all licensed Planning users
  - [Sage Intacct Planning - Webinars](#)

- Reach out to your Armanino client manager with any questions
  - Feel free to reach out to Kern or Forrest as well

# Thank You

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